COUNTY OF FRESNO GENERAL PLAN UPDATE PROGRAM

ECONOMIC AND GROWTH ALLOCATION AND METHODOLOGY REPORT



February 23, 1999

Board of Supervisors

DATE:

FROM:

TO:

Agenda Item

		County Adr	ministrative Or	rice			
		Carolina Jir Public Work	menez-Hogg, I ks & Developn	Director (),,, (nent Services De	in lueve	3 Hogg	
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William H. Randolph, County Administrative Officer

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BACKGROUND

At its July 28, 1998, hearing, the Board of Supervisors provided direction to County Staff and the General Plan Consultants regarding the Preferred Economic and Growth Scenario to be pursued in the preparation of the Economic Development Strategy and the General Plan Update. The Preferred Scenario is a combination of Economic Scenarios B/C (Shifts in Agricultural Production/Value-Added Agriculture) and D (Non-Agricultural Basic Employment).

Since the Board's direction in July 1998, County Staff and the General Plan Consultants have worked with the city planning directors of Fresno County, and the staff of the Council of Fresno County Governments and the Local Agency Formation Commission (LAFCO) through a series of monthly meetings to develop a statistical description of the "Preferred Scenario." In developing this description, the Consultants used a slightly revised version of the methodology they used to prepare the Economic and Growth Scenarios report in the Spring of 1998.

In the development of the statistical description of the Preferred Scenario, there was extensive discussion of both the countywide population and employment projections for 2020 and the distribution of projected growth among the cities and the various unincorporated geographic areas of the county.

After the second draft of the allocation report was prepared in November, the California Department of Finance (DOF) released a new set of statewide population projections that lowered the estimated population in Fresno County in 2020 from roughly 1.5 million to 1.1 million, a 54 percent reduction in population growth. After further discussion with DOF Staff and among County Staff, the Consultants, and city planning directors, the Consultants revised the allocation report based on the new DOF figures.

DISCUSSION

The Economic and Growth Allocation and Methodology report projects future population and job growth countywide through the year 2020, allocates this population and job growth among the county's 15 incorporated cities and five unincorporated geographic sectors of the county, and translates the population growth into demand for residential land and the employment growth into demand for non-residential land.

This economic and growth allocation will be used as a general guide for the expected level and distribution of growth to assist the County Staff, General Plan Consultants, and other update participants in drafting General Plan policies and the land use

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diagram, and in preparing the General Plan EIR in Phase 2 of the General Plan Update.

Consistent with existing County policy and the recommendations of the Landscape of Choice report, the growth distribution component of the allocation directs approximately percent of new population and new jobs to incorporated cities.

As stated above, the Economic and Growth Allocation and Methodology report that is recommended for adoption has been revised extensively based upon dialogues with the cities and other agencies, new population projections from the DOF, and policy direction from your Board with respect to the preferred combined economic scenario and conformance with the *Landscape of Choice* document. Some of the process participants still maintain the 2020 DOF projections for Fresno County are too conservative. Likewise, some of the cities have pointed out that reduced countywide growth estimates translates into projected future growth rates for them that are well below their historical growth rates and the rates assumed in their current general plans and infrastructure plans.

Earlier private sector projections had also been higher for the Central Valley, and for Fresno County in particular. However, more recent projections prepared by Stephen Levy, Senior Economist with the Center for the Continuing Study of the California Economy, which publishes independent population and employment projections, are consistent with the new DOF projections.

The report acknowledges that to the extent the proposed Economic Development Strategy is successful, more workers may be attracted to the county, leading to population growth higher than projected by DOF.

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Attachments

FRESNO COUNTY GENERAL PLAN UPDATE

PREFERRED ECONOMIC AND GROWTH SCENARIO

ECONOMIC AND GROWTH ALLOCATION AND METHODOLOGY

PREPARED BY:

APPLIED DEVELOPMENT ECONOMICS IN ASSOCIATION WITH J. LAURENCE MINTIER & ASSOCIATES

FEBRUARY 11, 1999

INTRODUCTION

As part of the Fresno County General Plan Update program, County Staff and the General Plan Update Consultants prepared the report Economic and Growth Scenarios: Perspectives on the Year 2020. The report was published to solicit direction on the economic and growth philosophy that would guide preparation of the Draft General Plan. Following extensive public review and hearings and recommendations by the Planning Commission, the Board of Supervisors on July 28, 1998, selected a combination of Scenarios B (Shifts in Agricultural Production), Scenario C (Value-Added Agriculture), and Scenario D (Non-Agricultural Basic Employment) as the "Preferred Scenario."

Scenario B emphasized growth in agricultural production employment resulting from a shift in crop patterns from cotton and other lower-value crops to higher-value crops such as fruits, nuts, and vegetables. Scenario C projected a significant increase in industrial development resulting from value-added agricultural business activity and employment. These two scenarios were combined in the *Economic and Growth Scenarios* report since their land use implications overlapped substantially. Scenario D projected a significant increase in non-agricultural manufacturing and information technology industries in Fresno County.

As part of its direction, the Board also endorsed the recommendations of the Landscape of Choice report.

The General Plan Consultants used a slightly revised version of the methodology they used to prepare the economic and growth scenarios to prepare a statistical description of the Preferred Scenario. This Preferred Scenario also reflects new State Department of Finance (DOF) population projections which are substantially lower than the projections used as a basis for the *Economic and Growth Scenarios* report. The first part of this report describes the methodology for defining the preferred countywide economic scenario and allocating jobs and population to county geographic areas and cities. The second part of the report describes the methodology for translating the preferred economic scenario into a physical growth scenario.

Before describing the methodologies, however, several points need to be made about the geography of the allocation process. The process allocates jobs and employment to five geographic areas and to 15 incorporated cities as shown in Exhibit 1.

In the case of the incorporated cities, the allocation process uses the current LAFCO-adopted spheres of influence instead of current city limits to define the city. New jobs and population are allocated to city spheres without regard to whether there is sufficient land or adequate services today within the spheres to accommodate the projected growth. Thus, the allocation process treats cities more like centroids than physically defined containers for growth.

METHODOLOGY FOR DEFINING THE PREFERRED COUNTYWIDE ECONOMIC SCENARIO AND FOR ALLOCATING JOBS AND POPULATION TO COUNTY GEOGRAPHIC AREAS AND CITIES

Total Population and Employment Growth

The first step in creating the Preferred Scenario was to reconcile the earlier scenarios to the new California Department of Finance (DOF) projections released in 1998. The new DOF projection reduces the year 2020 county population from 1,505,500 to 1,114,403, reducing projected 2020 population by 26 percent and the 1996-2020 growth increment by 54 percent. The new 1996-2020 projection averages 1.6 percent annual growth, compared to 2.5 percent that occurred during the 1970-1990 period and 2.2 percent from 1990 to 1996. The most recent growth rates have been below two percent and DOF projects over the long term that Fresno County will move closer to the state average which DOF projects to decline from the high growth periods during the 1970s and 1980s. DOF also projects that Fresno will continue to experience the lower in-migration rates of the past several years compared to the early 1990s.

While earlier private sector projections show the Central Valley and Fresno in particular with a larger share of future statewide growth. The view reflected in the new DOF projections is corroborated by Stephen Levy, Senior Economist with the well-respected Center for the Continuing Study of the California Economy, which publishes independent population and employment projections out to the year 2005. Mr. Levy suggests that accelerating employment growth in the metropolitan regions of the state will result in slower growth in the Central Valley and this trend will not change until significant economic diversification occurs in the interior regions of the state.

The DOF projections reflect a continuation of past economic development trends in Fresno County and do not recognize the potential impact of the County's proposed Economic Development Strategy in terms of increased job growth or shifts in the type of jobs that may be created in Fresno County. However, since the main concern of the proposed Economic Development Strategy is improving the balance between job growth and the growth in labor force, County Staff and the Consultants recommend using the DOF projections in the Preferred Scenario for purposes of updating the General Plan. The Preferred Scenario, as described below, includes higher rates of job growth in relation to population growth than the county has experienced in the past. The primary desired outcome of this projection would be a reduction in the long term unemployment rate in the county. A secondary effect, not explicitly included in the projection, may be that the increased job base would attract additional workers from other regions and thus increase net migration and total population growth in the county above the level currently projected by DOF.

Exhibit 2 shows the Preferred Scenario and the projected growth over the 1996 base year. In constructing the employment projections, three economic sectors provided the driving forces consistent with the Board of Supervisors' direction on the Economic and Growth Scenarios report. These sectors include agricultural manufacturing, non-agricultural manufacturing, and commercial office development. In addition, the agricultural production employment (farm labor) follows a

moderate growth curve that reflects the countervailing net effects of crop changes and technological improvements in production practices. Supporting business sectors such as warehousing, distribution, and transportation activities were projected to grow in proportion to job growth in the four main sectors mentioned above. Other business types such as retail/services and public/institutional were projected to grow in relation to the new DOF population projections.

The total level of employment growth was projected at a rate to achieve a reduction in the average unemployment rate from about 13 percent currently to four percent by 2020. The bottom line in the exhibit shows the current and projected relationship between population and jobs in the county. In 1996, the number of jobs is estimated to be less than half the size of the population. For the 1996 to 2020 growth period, the number of new jobs is projected to be about two-thirds of the number of new persons residing in the county, resulting in a four percentage point increase in the jobs to population ratio and about a nine percent improvement in the relationship between jobs and labor force. As noted above, this does not account for the possibility of increased inmigration of workers which would exert continued upward pressure on the county's unemployment rate.

Growth Allocations to the Cities and the Unincorporated Areas

The process for the geographic allocations began with projecting basic employment (agricultural, industrial and regional office) in each jurisdiction. Population growth partially follows the basic employment distribution, with the remainder based on independent projections made by the Council of Fresno County Governments (COG). The total population projections for each jurisdiction provided the basis for distributing non-basic, or local-serving employment. Thus, the model assumes that basic employment drives part of the growth throughout the county. The first step in the process was to develop a 1996 base for each jurisdiction as described below. See the flow chart in Exhibit 3 outlining the overall process.

The 1996 Base •

The COG prepares regional land use projections for use in its regional transportation model (see Exhibit 4). This information was a useful starting point for the geographic allocations, with several adjustments. The first adjustment to the COG data was to increase total county employment and to decrease total county population. The population figures were adjusted to reflect more recent estimates by the California Department of Finance. The increased employment is due to the fact that Federal Bureau of Economic Analysis (BEA) figures for Fresno County showed higher total employment due primarily to differing estimates in farm labor, but also due in part to more comprehensive estimates in self-employment, which is frequently missed in wage-based employment estimates. The total of 359,000 jobs for the county matches better the labor force figures in terms of employed and unemployed residents in the county.

The next step was to adjust the distribution of development to reflect the different county totals. In this process, the Consultants translated the COG land use categories into the generalized categories used for the scenarios analysis. Exhibit 5 shows the Standard Industrial Classification

(SIC) definitions of the non-residential categories in the COG data. The non-residential generalized land use categories developed for the scenarios analysis are more detailed in several cases than the COG categories. They also differ from the business cluster definitions used by the Consultants to analyze the regional economy and to construct the economic scenarios which are the basis for the detailed employment projections in Exhibit 2. The discussion below outlines the specific assumptions and procedures used to reconcile the various land use and economic databases.

The non-residential generalized land use categories developed for the scenarios analysis include the following:

Retail = Retail and all non-office services including lodging, personal

services, repair services, and certain business services.

Office = Finance, insurance, and real estate (FIRE) and office-related services

such as computer-related, personnel agencies, and professional

services.

Industrial = Agricultural infrastructure, mining, construction, manufacturing,

wholesale, and transportation communications and utilities (TCU).

Public/Institutional = Government, education.

Ag. Production = Ag. Production

The first step was to convert the COG land use categories into generalized land use categories. The State's Teale Data Center provided businesss cluster employment data by zip code that is very detailed in the agricultural, industrial, and office categories and permitted ADE to break apart the COG "Services" and "Other" categories into retail, office, industrial, and agricultural production employment. The SIC definitions of the business clusters are shown in Exhibit 6. The procedures for this allocation were as follows:

- A. The Teale data for the information processing cluster in each jurisdiction represents a part of the office employment category. We subtracted this employment from the COG services category and placed the remainder of the COG services category in the retail land use category.
- B. The remainder of the office category is comprised of local services, estimated in Fresno County to be about 15 percent of FIRE employment (less bank employment). This portion of the office employment was subtracted from the COG "Other" category.
- C. ADE further divided the COG "Other" category as follows:
 - Teale cluster data provided agricultural production employment.

 The industrial category received the remainder of "Other" employment not allocated to office or agriculture.

This process also required translating the zip code geography to the general plan land use geography. Exhibit 7 shows the zip codes in the county, while Exhibits 8 and 9 show the employment maps generated by with the Teale data. The maps do not provide information for all the zip codes due to disclosure restrictions. However, ADE was provided with a complete set of data for each cluster and zip code in tabular form for use in this projection process.

Exhibit 10 shows the correspondence between zip codes and city and county jurisdictions. Since the zip codes in most cases are larger than the city sphere of influences (SOIs), the following rules were applied to zip codes that include both city and county areas (but not for zips in the Fresno/Clovis metro areas that are totally within the city limits).

- Ag. Employment 75 percent to unincorporated region, 25 percent to city SOI.
- Ag. Mfg.- 20 percent to unincorporated region, 80 percent to city SOI.
- Other employment 100 percent to city SOI.

Finally, the resulting employment allocations required minor adjustments to correspond to State Employment Development Department (EDD) estimates of total employment in each jurisdiction. Exhibit 11 shows the resulting 1996 population and employment base, and Exhibit 12 shows the percent distribution of development for 1996 which may be used to compare with the future projections.

Allocation Process

Allocation of the Preferred Scenario growth increment to the geographic units began with the business cluster employment. Each jurisdiction's share of cluster employment in 1996 provided the basis for distributing the future cluster growth. While we also have data showing growth in cluster employment between 1991 and 1996, many of the smaller locales experienced extreme fluctuations or declines in employment during this period. Any projection formulas we attempted that incorporated the growth data resulted in very improbable imbalances in the growth allocated to similar, nearby cities and regions. Therefore, the best results were achieved by using the 1996 distribution of employment as the sole basis for projecting future growth. While this is a relatively simple approach, it does correspond to the concept that clusters develop from existing buyer-supplier networks and tend to spread outward from business centers with the highest employment concentrations.

In this process the Consultants also recognized the recommendations of the Landscape of Choice document regarding the concentration of urban development in existing urban jurisdictions. In some cases, adjustments were made to direct certain kinds of future employment growth into city SOIs rather than county unincorporated areas even though it currently exists in county areas.

The cluster data (Exhibit 6) approximates the employment categories in the economic scenarios

(Exhibit 2). The combined total of the Teale agricultural infrastructure cluster and food production clusters (clusters 1-5) provided the basis for agricultural production employment allocations. The agricultural manufacturing employment corresponds to the food and fibre processing cluster (cluster 8), and the non-agricultural manufacturing employment corresponds to the metals and machinery cluster (cluster 6). Office employment corresponds to the information processing cluster (cluster 7). The Consultants then allocated construction, mining, warehouse, distribution, and transportation employment in proportion to the total manufacturing employment allocations in each jurisdiction.

The Consultants determined that a portion of population growth should also follow the cluster employment allocations. To some degree, the various scenarios emphasize different labor force characteristics and corresponding housing needs. The alternative emphasizing agricultural production and manufacturing (B/C) would increase housing demand in the smaller agricultural communities, while the non-agricultural manufacturing and the information processing (Alternative D) would focus housing demand to some extent in the Fresno-Clovis metropolitan areas and the communities along Highway 99.

Therefore, the Consultants calculated the percentage of total employment growth in each scenario that is in the basic employment categories and allocated this proportion of the population growth increment in each scenario to the jurisdictions in the same proportion as the basic employment was allocated. The Consultants used the COG 1996-2020 population projections to allocate the remainder of population growth in each scenario. The Consultants checked the total population projections against the 1996 distribution of population and any obvious disparities among the cities or the county planning areas were corrected. Finally, the Consultants allocated the local-serving non-basic employment growth in proportion to total population growth in each jurisdiction. The resulting allocations are shown in Exhibits 13 and 14.

Analysis of the Growth Allocations

Exhibit 15 shows the percentage distribution of the 1996 to 2020 growth increment of the Preferred Scenario, which may be compared to the 1996 distribution shown in Exhibit 12. The allocations result in 93 percent of new population and employment growth within city spheres of influence and seven percent going to unincorporated county areas, compared to 85 percent and 15 percent, respectively, in 1996. Clovis and the Fresno gain a higher percentage of future growth in population and most employment categories than their 1996 share. The only exception to this is in agricultural production employment which increases more in the county's unincorporated areas.

The next three Exhibits (16, 17, and 18) show the ranking of the cities according to their growth projections. Exhibit 16 compares the population growth allocations. While the city of San Joaquin shows the highest percentage change, this is mainly because it is starting from the lowest base. Its numerical change is less than most of the other cities. Otherwise, Clovis and Fresno receive the majority of growth under the new projection. The county unincorporated area is lowest on the chart in terms of population growth percentage. It starts out with 15 percent of county population but gets only 7.4 percent of the increment.

Exhibit 17 shows a similar comparison for total employment. Fresno and Clovis are projected to gain most of the new jobs, although small cities like San Joaquin and Huron score well on a percentage basis. The unincorporated area is again last on the chart.

Exhibit 18 shows the differences by type of employment. Fresno and Clovis have very large percent changes in the office sector, which has the most job growth in the Preferred Scenario. This is major reason for their total employment growth being so high. Comparing Exhibit 12 and 18, Fresno has 70 percent of office employment currently and gets 80 percent of the future increment. Clovis has nearly 10 percent of the 1996 office employment base and gets 16 percent of the increment. Part of the reason for this strong performance is that Clovis experienced rapid growth in the prime business sectors comprising the information technology cluster which is a focus of the economic development strategy. The unincorporated area, on the other hand, is estimated to have more than eight percent of office employment in 1996 but gets less than one percent of the increment. This is an adjustment made to reflect the Landscape of Choice as noted earlier.

In the industrial sector, the unincorporated area appears in Exhibit 18 to have a very high growth rate, but again this is a function of the extremely low base in 1996. Some food processing development is likely to occur in the unincorporated area as this sector expands rapidly and this is the reason for the projection.

Comparison of 2020 Population Projections with City and County Holding Capacities

Exhibit 19 compares the new allocations to the estimated population holding capacities of each jurisdiction for the year 2020 (column 3 of the table). In most cases, the year 2020 holding capacities in the exhibit are hypothetical estimates made by the Consultants to extend the general plan horizon year for each city out to a consistent point for comparison with the growth scenario. This was done for all the cities except Clovis and Fresno (proposed 10z alternative), whose general plans already extend beyond 2020.

For most cities, the growth rates in column 3 of Exhibit 20 were used to make this adjustment. These are the rates implied by the difference between the city's 1996 population and the buildout population in the general plan horizon year. For Fowler, Huron, Orange Cove, and Sanger, where the buildout population had been exceeded by 1996, the growth rates in the first column of Exhibit 20 were used. These rates reflect actual growth from 1990 to 1996.

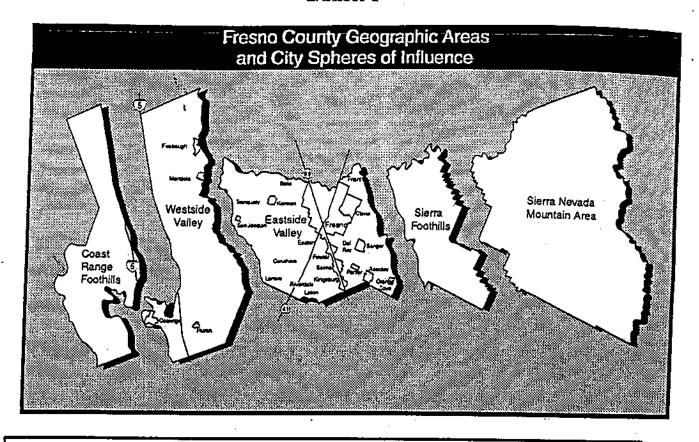
The general plan land use consultant, Crawford, Multari, Clark & Mohr (CMCM), estimated the county holding capacity. The total unincorporated area holding capacity is estimated at about 379,400, which reflects 80 percent of theoretical capacity at maximum zoning densities. CMCM revised this analysis from the figure presented in the Economic and Growth Scenarios report based on more detailed GIS measurements recently completed.

As shown in Exhibit 19, the new growth allocations can be accommodated within the holding capacities for each area/jurisdiction except for the city of Firebaugh and the unincorporated East Valley area.

METHODOLOGY FOR TRANSLATING THE PREFERRED ECONOMIC SCENARIO INTO A GROWTH SCENARIO

New employment and population allocated geographically in the previous phase was translated into a physical growth scenario using exactly the same methodology used in the Economic and Growth Scenarios report (see Exhibit 21 and 22). Based on a set of assumptions and multipliers (see Exhibit 23), population growth was converted to dwelling units and ultimately to residential land demand (acreage) (see Exhibits 24 and 25). Employment growth was converted to new building square footage and ultimately to non-residential land demand (acreage)(see Exhibits 26 and 27). The assumptions and multipliers used in this step (see Exhibit 21) come from various sources, but are generally based on current conditions in Fresno County and California. Some of these assumptions and multipliers such as residential density could be altered by local policy choices, which, of course, would change the land demand estimates. Exhibit 28 summarizes residential, non-residential, and total land demand by geographic area for the 1996-2020 growth increment.

Exhibit 29 compares the total land demand for each city with the amount of land within current LAFCO-adopted spheres of influence. As Exhibit 29 shows, projected land demand in 2020 can be accommodated within each city's current sphere except in the case of Fresno. It should be noted that this comparison in Exhibit 29 does not consider either vacant land and other infill possibilities within current city limits or existing development within city unincorporated spheres which could limit future growth. These two factors would offset each other to some extent.



CITY LIMITS AND SPHERE OF INFLUENCE POPULATION AND AREA 1996

		CITY LIMITS		SPHE	RE OF INFLUE	NCE
	POPULATION	SQ. MIL	ACRES	POPULATION	SQ, MI,	ACRES
Coalinga	9,937	4.1	2.624	9,758	8.2	5,248
Firebeugn	5,827	2,1	1,984	57 6 3	5	3200
Huron	5,534	1.6	1,024	6.203	2.1	1,344
Mencors	7,418	21	1,344	8.539	3.5	2,240
Clovis	65,047	15.4	9,856	68,552	22.8	14,592
Fowler	3.746	1.9	1216	1,292	7.1	4,544
Fresno	400,884	104.3	66,752	440,648	142	90,860
Kermen	(8.73)	19	1216	7,927	4.5	3 072
Kingsburg	8,472	2.3	1,472	6.950	5.7	3,648
Crange Cove	8,705	1.8	1,024	7,113	2.8	1,664
Partier	9,464	t.5	960	9,865	2.6	1.864
Reactey	19,102	43	2,752	20,714	73	4,572
Sanger	18,312	4.5	2,880	21,358	7.3	4,672
San Josquin	2,924	10	640	3,550	-115	960
Selma	17,320	3.9	2,496	21,643	10.2	6,528
PICORPORATED TOTAL	507,418	153.5	M240	\$45,022	212.7	148,926
UNINCORPORATED TOTA	IL 174,414	5,851.6	3,745,024	. 115,799	5,772.4	3,694,336
FRESHO COUNTY TOTAL	761,832	0,005. 3	3,443,264	761,822	€,805.1	2,843.284

This population figure is based on traffic an do not include all incorporated population.

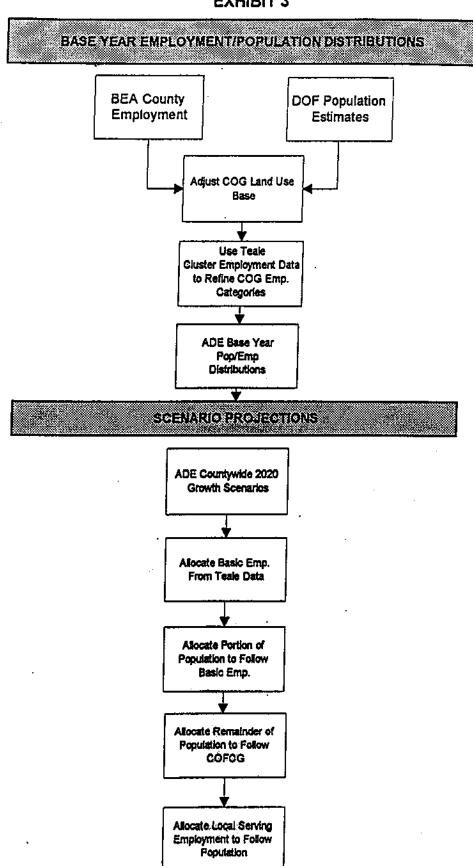
Sources: California Department of Finance Freeno County LAFCO Consultant Team based on Council of Freeno County Governments

EXHIBIT 2

COUNTYWIDE GROWITH PROJECTIONS 1996, 2020, and 1996-2020 Growth Increment

	1996 Base Year	Preferred Scenario	1996-2020
,		(u)Mora dodovori)	Growth Increment
Total Population	200 200		7
Total Employment		1,114,410	344 701
The state of the s	3/0,7/8 100.0%	603,712 100.0%	
			100.0%
Ag. Production	86.333		
Ag-Mfg (Food & Fiber)		%1.71 17.1%	16,758 7 2%
Non-se Mar	4.076	39,382	20 204
Single Prints	7.4%	43,340	
Construction, Mining	18,529 5,0%	22.240	%6.9
Warehouse, Distrib, Transp			5,081
Commercial: Retail & C.		46,921	16.600 7 10
Commonial Office		123,409 20.4%	
Contraction: Office	29,324 7.9%	113,048	
Outer Local Serving	12,979 3.5%	\ -	35.9%
Public/Institutional	63,626 17.9%	00100	5,812 2.5%
		24,140 15.3%	28,494
Ratio Emp. to Pon.	70.07		
	40.470	54.2%	67 69.
			90.5

EXHIBIT 3



Ехнівіт 4

FRESNO COG 1995 LAND USE DATA

	ogul .	Poutation	Count Poutation Households	STRO	SPILI	SFH 24	MF110	MED 1	MFH 2+	Emphysnent	Rotail	Service	ر م	Education	Non-Retall	Olber Emp
1885 Chule 501	131	92,123			-						5,003	4.735	1.550		24 650	
Contract Property	2	10.0									414	47.4	2.0		000.4	¥
Costuda ocu	•											2	2		2,087	3
County SQL	\$	138,901			٠.						4,079	4,742	871		36.390	27 65
Firebands 301	Φ.	5.447			•						232	108	20	٠,	0.00	, i
Fowler SO!	F	4.697									158	234	87	έ,	1356	2 6
Firetto 501	51.1	429,715	150,150	9,825	33,381	52,769	9,784	22,639	22,736	213,483	30,907	48,500	20.845	15,804	CEN CEN	2 3
Huron SOI.	~	6,039									5	113	-	-	515,500	5
Kennan SOI	Ξ	8.68									284	237	20.		200	7.
Khosburi 501	2	0,630									519	133	\$		10.	5
Mendols SOI	0	979									5	52	8		*10.4	
Ocaroe Com SOI	G	7.65									Ξ	193			174.1	
Partie SO:	9	10.49									216	. E	121		6	
Reedley SOL	38	22,30		٠.							1.158	1410	3		808.	1,25
San Institute SQL		1.27									2	8	4		cin's	303
Sanger SO	72	72,63	٠:	٠.	-	•					1,000	926	AC		7	R
Selma SOI	12	23,42	3 6.791			,					1.559	620	22	. •	0.044	3
Total County	150	SC COS	;	. :	٠.	-					46,119	B3.586		•	0000	202

STANDARD INDUSTRIAL CLASSIFICATION CODE BY INDUSTRIAL CATEGORY AS USED IN THE TRAFFIC MODEL

CATEGORY	STANDARD INDUSTRIAL CLASSIFICATION CODE*
Retail	5211 - 5999
Services	7011 - 8111 8322 - 8999
Government	4111 4311 8231 9111 - 9399 9431 - 9799
Education	4151 8211 - 8 <u>222</u> 8241 - 8299 9411
Other	0111 - 4013 4119 - 4142 4173 - 4231 4412 - 5199 6011 - 6799 9999

Standard Industrial Classification (SIC) codes are the classification standard used by all Federal and State economic statistics tabulated by industrial sector.

SIC DEFINITIONS OF CLUSTERS

SIC AGRICULTURE INTRASTRUCTURE 301 Preparations envives (107 Copy services (108 Prima labor and management services (109 Prima labor and management services (101 Productions and Numery Products (101 Commental Puriculume and Numery Products (101 Commental Puriculume and Numery Products (101 Commental Puriculume and Numery Products (101 Laws and garden equipment (101 Commental Puriculume and Numery Products (101 Laws and garden equipment (101 Commental Puriculume and Numery Products (101 Commental Puriculume and Numery Pr	(LUSTER 1	c	LUSTER 3		CLUSTER 5
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EXHIBIT 6 (CONT.)

CLUSTER 8

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SIC	FOOD AND FIBRE PROCESSING CLUSTER
201	Meet products
202	Dairy products
203	Preserved fruits and veg.
2041	Flour
2043	Ceresi
2044	Rice milling
2045	Prepared flour mixes
2046	Wet corn milling
2047	Dog and cat food
2048	Prepared feeds
205	Bakery products
206	Sugar products
2068	Salted and roasted nuts/seeds
2074	Cottonseed oil mills
2075	Soybean oil mills
2076	Vegetable oil mills
2077	Animal facs
2084	Wines and brandy
2096	Potato chips, etc.
2098	Macaroni
2099 221	Food preprations, nec.
226	Broadwoven cotton mills
228	Textile finishing, except wool
239	Yarn and thread mills
239 5141	Mise. Fabricated textiles
5142	Groceries
5143	Packaged frozen foods
5144	Dairy products
5145	Poultry
5143 5147	Confectionary
5147 5149	Mest products
5182	Grocenies, sec.
3144	Wines and distilled beverages

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EXHIBIT 7
FRESNO COUNTY ZIP CODES

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EXHIBIT 8

EXHIBIT 9

ZIP CODE ALLOCATION TO CITY/COUNTY JURISDICTIONS

Clovis 93612 93720 (Share with Fresno) 93710 (Share with Fresno) 93710 (Share with Fresno) 93611 (Share with County) 93611 (Share with County) 93625 Fresno 93720 (Share with Clovis) 93710 (Share with Clovis) 93710 (Share with Clovis) 93721 (Share with County) 93723 (Share with County) 93723 (Share with County) 93721 (Share with County) 93702 93721 73701 73703 73728 73705 73704 73650 93711 Kerman 93630 Kingsburg 93631 Orange Cove 93646 Parlier 93648 Reedley 93654 San Joaquin 93660 Sanger 93657 Selma 93662 Unincorporated 93242 Unincorporated 93242 93656 93609 93652 93627 Sierra Foothills 93611 (part) 93618 West Valley Coalinga 93210 Firebaugh 93622 Huron 93234	<u>Jurisdictions</u>	Zip Codes
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73705 73704 73650 93711 Kerman 93630 Kingsburg 93631 Orange Cove 93646 Parlier 93648 Reedley 93654 San Joaquin 93660 Sanger 93657 Selma 93662 Unincorporated 93242 93656 93609 93652 93627 Sierra Foothilis 93611 (part) 93618 West Valley Coalinga 93234 Huron 93234		73728
73704 73650 93711 Kerman 93630 Kingsburg 93631 Orange Cove 93646 Parlier 93648 Reedley 93654 San Joaquin 93660 Sanger 93657 Selma 93662 Unincorporated 93242 93656 93609 93652 93627 Sierra Foothills 93611 (part) 93618 West Valley Coalinga 93622 Huron 93234		73705
73704 73650 93711 Kerman 93630 Kingsburg 93631 Orange Cove 93646 Parlier 93648 Reedley 93654 San Joaquin 93660 Sanger 93657 Selma 93662 Unincorporated 93242 93656 93609 93652 93627 Sierra Foothills 93611 (part) 93618 West Valley Coalinga 93622 Huron 93234		73705
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Sierra Foothills 93611 (part) 93618 West Valley Coalinga 93210 Firebaugh 93622 Huron 93234		
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West Valley Coalinga 93210 Firebaugh 93622 Huron 93234	oicita : ootatas	· ·
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Coalinga 93210 Firebaugh 93622 Huron 93234	West Valley	
Firebaugh 93622 Huron 93234	•	93210
Huron 93234		
	-	
Mennota 9.5040	Mendota	93640
Unincorporated 93620		
93608	man paratou	
93668		

EXHIBIT 11

GEOGRAPHIC ALLOCATION OF POPULATION AND EMPLOYMENT Base Year 1996

The state of the s	Population	Tot. Employ.	Retail/Local	Office	Industrial	Pub Anet
FRESNO COUNTY TOTAL	769,700	370,781	98,217	29,325	93.280	207 67
		-				00,02
EAST VALLEY TOTAL	709,805	342,999	94,108	28 500	87 031	21 0000
Clovis	69,260	34,238	8,929	2883	11 305	7,0,10
Fowler	5,347	2,282	358	159	2007	2001
Fresno	445,199	221,994	68,432	20.768	64 278	PC7
Kerman	8,009	2,699	488	136	280	10,430
Kingsburg	9,042	4,137	1.018	340	1 511	200
Orange Cove	7,186	2,317	304	113	1 200	528
Parlier	296'6	3.293	385	150	1 (2)	757
Reedley	20,928	8.863	2308	717	1,032	512
San Joaquin	3.718	708	155		1,119	1,333
Sanger	21 577	0.00	8	4/	271	204
Selma	200	0,473	7/00	650	2,892	1,324
	71,80/	7,139	2,353	419	2.425	787
Chilical polatica Cast Valley	87,705	46,966	2,607	2,109	118	4 000
CHEDRA BOOTERIE						NW.
Stricter (CO Initits (county)	11,727	2,234	296	19	LC.	387
OHIDD A NITTO A STATE OF)	700
SIERKA NEVADA MINS. (county)	6,146	906	664	59	4	721
MINISTER STATES OF STATES					,	077
WEST VALLEY TOTAL	41,748	24,609	2,826	969	5 337	1 004
Continga	638'6	4,265	756	201	2 090	2000
Mrebaugh	5,853	2,626	325	7	1 250	77/
Huron	6,267	2,483	224		407/1	406
Mendota	8,627	2,975	334	200	33	188
Unincorporated West Valley	11.142	12.260	1 107	3	1,026	296
			707/7	249	20	382
COAST RANGE FOOTHILLS	274	83	23	0	-	
				`	-	

EXHIBIT 12

ALLOCATION OF COUNTYWIDE ECONOMIC SCENARIOS TO GEOGRAPHIC UNITS Base Year 1996

	Population	Tot. Employ.	Retail/Local	Office	Industrial	Pub/Inst.
lovis	%0.6	9.2%	9.1%	%8'6	12.1%	12 39/
Coalinga	1.3%	12%	0.8%	0.7%	23%	1 10/
Firebaugh	%8'0	0.7%	0.3%	0.2%	1 4%	1.1/0
Fowler	0.7%	%90		0.5%	0/80/	0.0%
Fresno	57.8%	59.9%	%2.69	70.8%	0/O'O	%C.0
Huron	0.8%	0.7%		0.2%	1 00%	08.3%
Kerman	1.0%	0.7%		0.5%	0.2%	0.3%
Kingsburg	1.2%	1.1%		12%	167	0.9%
Mendota	1.1%	0.8%		0.4%	1.0/0	0.8%
Orange Cove	0.9%	9.0		0.4%	1.1/0	0.5%
Parlier	1.3%	0.9%		0.5%	1.0%	0.4%
Reedley	2.7%	2.4%		70Y C	1.0%	0.8%
San Ibaquin	ا ا	90.0		0/E-77	1.7%	2.1%
20000	7000	0,2,0		0.7%	0.3%	0.3%
Sanger	7.8%	7.2%	1.8%	2.2%	3.1%	2 1%
Selma	2.8%	1.9%	2.4%	1.4%	2,6%	1 200
Unincorp. County	15.2%	16.8%	10.3%	8.5%	7000	77.7
TOTAL	. 100.0%	100.0%	100.0%	1000%	100.001	7.070
East Valley	11.4%	12.7%		7.2%	0.10	100.0%
Sierra Foothills	1.5%	9.0		%20	0/1.0	6.5%
Sierra Nev. Mtns.	0.8%	0.2%		0.2%	0.0%	0.6%
West Valley	1.4%	3.3%	1.2%	0.8%	%00	%C0
Coast Range	%UU	/eU U	7000		2/2:5	0.0 %

EXHIBIT 13

PREFERRED SCENARIO GEOGRAPHIC ALLOCATION OF POPULATION AND EMPLOYMENT Growth Increment (1996 - 2020)

	Population	Tot Emmine				
FRESNO COUNTY TOTAL		Total Employ.	Netall/Local	Office	Industrial	Pub./Inst.
	COU, FFC	731,241	43,905	83,308	59,975	28.443
EAST VALIEV TOTAL						
Carrie IOIAL	325,592	219,660	41,546	82,660	56.061	1,10,76
LIGATS	42,274	28,779	5,394	13,587	6043	2 404
rowler	1,795	1,191	229	200	TO/O	5,494
Fresno	230,782	159,995	29,448	68.782	40.027	148
Kerman	3,006	1,466	384	180	75/01	19,077
Kingsburg	2,519	1,610	321	91	700	248
Orange Cove	1,964	1,209	251	5	9//	208
Parlier	2,925	1.782	273	3 8	669	162
Reedley	6.787	3,672	270	502	873	242
San Joaquin	2 573	2,012	000	402	1,142	561
Sanger	200	2 2	328	æ	188	213
Selma	2000	3,713	229	368	1.954	438
11.	7,172	3,662	915	391	1 5.29	OCT.
Unincorporated East Valley	18,493	11,750	2,360	194	000	260
					222	1,529
SIERRA FOOTHILLS (county)	2,211	1,196	282	127	7	
)or	011	183
SIERRA NEVADA MTNS. (county)	565	119	72			
						47
WEST VALLEY TOTAL	15,692	10,260	2,002	481		
Coalinga	3,183	1.977	ASK	101	3,804	1,297
Firebaugh	1,905	1326	242	501	1,113	263
Huron	3.189	1 844	CE7	IS	746	157
Mendota	3211	1 695	40/	8	899	264
Unincorporated West Valley	A 204	2 454	410	159	638	265
	20742	774'6	236	23	409	348
COAST RANGE FOOTHILLS	25	ur.	6			
			3	اد	0	2

EXHIBIT 14

GEOGRAPHIC ALLOCATION OF TOTAL POPULATION AND EMPLOYMENT PREFERRED SCENARIO 2020 Total

	Dement-12					
ERECNO COUNTY TOTAL	roputation	10t. Employ.	Retail/Local	Office	Industrial	Pub./Inst.
THEST COOKIT TOTAL	1,113,785	602,020	142,122	112,632	153.253	020 00
					200	22,070
EAST VALLEY TOTAL	1,035,397	562,658	135,653	111 160	142 001	
Clovis	111,534	63.017	14.323	12.470	142,721	87,989
Fowler	7,142	3.473	587	10,4/U	17,349	11,317
Fresno	675,981	381 989	07 880	308	1,179	443
Кетпап	11.015	4 165	17,000	155/8	105,216	62,527
Kingsburg	11.562	5.746	1 220	315	746	837
Orange Cove	9.150	3.576	1,000	230	2,287	736
Parlier	12,892	5.075	750	// S	2,098	395
Reedley	27.715	12 535	2 174	309	2,505	754
San Joaquin	6.291	1,630	404	1,119	2,261	1,894
Sanger	26,880	11 002	494	130	459	417
Selma	29 038	10 001	2,437	1,018	4,846	1,763
Unincorporated East Valley	107 107	10,001	3,268	810	3,988	1,377
	121,001	20/10	296'6	2,303	1,057	5.529
SIERRA FOOTHILLS (county)	13 938	2 420	Card			
	Saving.	OCE'C	8/9	229	115	565
SIERRA NEVADA MINS. (county)	6,711	1.024	764	į.		
				99	9	223
WEST VALLEY TOTAL	57,440	34.870	4 828	1 2000		
Coalinga	13,042	6.242	1 169	1,1/3	9,140	3,290
Firebaugh	1,757	3,952	201/1	303	3,211	985
Huron	9,456	4.328	153	ICI	2,014	563
Mendota	11,838	4.661	777	130	1,832	452
Unincorporated West Valley	15,347	15.687	1 72	797	1,664	561
			1,7,23	301	419	729
COAST RANGE FOOTHILLS	299	38	26	0		
				`	-	6

EXHIBIT 15

PREFERRED SCENARIO Distribution of 1996-2020 Increment

	Population	Tot. Employ.	Retail/Local	Office	Induction	
Clovis	12.3%	12.4%	19 30	16.00	Allumpillal	rub_linst.
Coalinga	7600	200	15 C C C C C C C C C C C C C C C C C C C	10.3%	10.1%	12.3%
Firehamer	27.70	0.5%	0.9%	0.1%	1.9%	%6 U
rii Cuaugii	0.6%	%9.0	%9:0	0.1%	1.2%	7070
rowier	0.5%	0.5%	0.5%	03%	%80	0.070
Fresno	67.1%	69.2%	67.1%	80.2%	68 39	0.5%
Huron	%6.0	0.8%	%6:0	0.1%	1 50/	67.1%
Kerman	%6:0	990	%60	7000	0/C:1	0.9%
Kingsburg	0.7%	%Z U	0.7%	0.270	0.8%	%6.0
Mendota	%60	764.0	0,70	0.7%	1.3%	0.7%
Orange Cove	7070	6, 70	0.270	0.2%	1.1%	%6:0
Parlier	8/00	0.5%	%9.0	0.1%	1.2%	0.6%
Desti	0.5%	0.8%	0.9%	0.3%	1.5%	/60 0
neediey	2.0%	1.6%	2.0%	0.5%	1 0%	0.5%
San Joaquin	%2.0	0.4%	0.7%	01%	0/ 201	Z.U%
Sanger	15%	1.6%	1 5%	2 15	0.3%	0.7%
Selma	2.1%	1 6%	2000	0.4%	3.3%	1.5%
Unincorp. County	7.4%	7 10	2.1%	0.5%	2.6%	2.1%
TOTAL	100 0%) 17.70 100 001	1.470	0.5%	2.4%	7.4%
East Valley	707 U	100.0%	100.0%	100.0%	100.0%	100 0%
Sierra Footbille	0/4.C	2.1%	5.4%	0.2%	1.6%	70.00
Ciorra Mar. Mar.	0.6%	0.5%	0.6%	0.2%	0.2%	0/ 2.0
MILET AT 11	0.2%	0.1%	0.2%	0.0%	7000	0.070
west valley	1.2%	1.5%	1.2%	0.1%	0.070	0.7%
Coast Range	%0:0	%0.0	%000	0000	0.7%	1.2%
			27.000	0.0%	0.0%	0 U%

EXHIBIT 16

FRESNO COUNTY GENERAL PLAN UPDATE POPULATION GROWTH ASSUMPTIONS

± ₩ •

	2001	0		Annual	Deviation
	Demelation	ZOZO	Growth	Growth	From
, , , , ,	roputation	Fopulation	Percentage	Percentage	County Ave.
วสก Joaquin	3,718	6,291	69.2%	20%	704.0
Clovis	69,260	111,534	61 19%	/90 0	0.770
Fresno	445,199	675.981	51 80	7.0%	0.5%
Huron	6,267	9.456	50.0%	1.6%	0.2%
Kerman	8,009	11.015	27.5%	1.7%	0.2%
Mendota	8,627	11 838	70.75	1.3%	-0.2%
Fowler	5,347	7.142	22.60	1.3%	-0.2%
Selma	21.867	29 fr38	0/0/00	1.2%	-0.3%
Firebaugh	5.853	7.757	32.0%	1.2%	-0.4%
Reedley	20 00	31476	32.5%	1.2%	-0.4%
Coalinga	9.850	C1//7	32.4%	1.2%	-0.4%
Parlier	6000	15,042	32.3%	1.2%	-0.4%
Kingsburg	0700	12,892	29.3%	1.1%	-0.5%
Orange Cove	7,072	79271	27.9%	1.0%	-0.5%
Sanoer	7,100	9,150	27.3%	1.0%	-0.5%
Total	7/2/7	26,880	24.6%	0.9%	D 69.
Ununcorp. County	116,995	142,493	21.8%	7000	0.070
IOIAL	769,700	1,113,785	44.7%	1.6%	97.0
				4,076	

EXHIBIT 17

FRESNO COUNTY GENERAL PLAN UPDATE TOTAL EMPLOYMENT GROWTH ASSUMPTIONS

	9661	2020	24-Year	Annual	Deviation
	Total	Total	Growth	Growth	From
	Employment	Employment	Percentage	Percentage	County Ava
San Joaquin	298	1,629	104.2%	302%	/0000
Clovis	34,238	63,017	84.1%	2.57%	0.70 /0
Huron	2,483	4,328	74.3%	70 PE C	0,500 V
Fresno	221,994	381,989	72.1%	2.29%	0.50%
Mendota	2,975	4,661	26.6%	1 89%	0.43 %
Kerman	2,699	4,165	54.3%	1 87%	0.1370
Parlier	3,293	5,075	54.1%	1 82%	47.7%
Orange Cove	2,317	3,526	52.2%	1 76%	0,22,70
Fowler	2,282	3,473	52.2%	1 769/	-0.2070
Selma	7,139	10,801	51 3%	1.70%	-0.28%
Firebaugh	2,626	3.952	50 5%	1.74%	-0.30%
Coalinga	4,265	6,242	46.4%	1.72%	-0.32%
Sanger	8,273	11,986	44 9%	1 56%	-0.44%
Reedley	8,863	12,535	41.4%	145%	-0.48%
Kingsburg	4,137	5,746	38.9%	1 28%	0/2000
Unincorp. County	62,397	78,896	26.4%	7000	4.00%
TOTAL	370,779	602,021	62.4%	2 04%	-1.00%

EXHIBIT 18

ECONOMIC DEVELOPMENT STRATEGY GROWTH SCENARIO 1996-2020 EMPLOYMENT GROWTH RATES

	Total	Retail	Office	Industrial	0.111
	Employment			THE THE THE	rubiic
San Joaquin	104.2%	198.1%	179.1%	%2 69	104.00
Clovis	84.1%	60.4%	471.2%	53.4%	104.0%
Huron	74.3%	181.9%	161.2%	%F.55	140.0%
Fresno	72.1%	43.0%	321.6%	762 297	140.0%
Mendota	26.6%	122.8%	128.7%	%(()	45.976
Kerman	54.3%	78.7%	132.4%	166.69	89.8%
Parlier	54.1%	97.1%	131.4%	100.078 F2 F9/	47.7%
Orange Cove	52.2%	82.3%	5K 10K	40.0%	47.3%
Fowler	52.2%	2000	121 00/	47.970	69.6%
Selma	F1 20	20000	07.1.01	68.6%	50.4%
Firehauch	9,727	20.770	73.2%	64.4%	75.6%
	%C'DC	74.9%	114.7%	58.8%	38.8%
Coampa	46.4%	53.7%	52.2%	53.0%	70 P YE
Sanger	44.9%	38.5%	56.7%	67.6%	22 16/
Reedley	41.4%	37.5%	26.0%	102 0%	20.1%
Kingsburg	38.9%	31.6%	%U 95	21 20/	47.176
Unincorp. County	26.4%	32.3%	16.7%	0/C.10	39.4%
TOTAL	62.4%	44 7%	704 10/	1042.0%	42.7%
(entitle		O/ /T.I.	204.1%	64.3%	44.7%

COMPARISON OF SCENARIO PROJECTIONS AND GENERAL PLAN BUILDOUT

3,153	299	3,452	1.727.858	269,700	TOTAL
		c c	3.452	274	Coast Kange
192,031	15,347	207,396	207,396	11,142	West Valley
12,681	6,711	19,392	19,392	6,146	Sierra Nev. Mtns
13 603	13,938	27,541	27,541	11,727	Sierra Foothills
(839)	106,197	105,358	105,358	87,705	East Valley
236 901	142,493	379,394	379,394	116,995	Unincorp. Count
24 483	29,038	53,521	49,674	21,867	Selma
2 353	6,291	8,644	2,000	3,718	San Joaquin
33.975	26,880	60,855	19,800	21,577	Sanger
17.547	27,715	45,262	35,000	20,928	Reedley
11 777	12,892	24,664	14,000	296'6	Parlier
11 046	9.150	20,196	2,000	7,186	Orange Cove
3.352	11.838	15,190	12,000	8,627	Mendota
5.487	11.562	17,049	13,800	9,042	Kingsburg
8 407	11.015	19,422	15,000	8,009	Kerman
8 110	9.456	17,568	5,530	6,267	Huron .
010 440	675.981	920,000	920,000	445,199	Fresno
37.250	7.142	44,392	3,160	5,347	Fowler
(491)	7.757	7,266	002'9	5,853	Firebaugh
5 132	13.042	18,174	16,000	9,859	Coalinga
112 266	111.534	223,800	223,800	69,260	Clovis
Capacity	Scenario	Capacity [b]	Capacity [a]	1996	
Year 2020 Holding	Economic Development	Year 2020 Holding	ropulation Holding		
From		Estimated	General Plan		
Difference			;		

[a] City holding capacities are taken from Table 3 of the Economic and Growth Scenarios Report, except where updated by the city in its questionnaire. County holding capacities calculated by CMCA.

[b] Estimated 2020 holding capacities are calculated by ADE to extend general plan development capacity figures use lower rates developed from the general plans rather than the higher actual beyond each cities plan horizon year. In most cases the rates used to extend the growth rates from 1990-1996.

EXHIBIT 20

COMPARISON OF HISTORICAL AND PROJECTED POPULATION GROWTH RATES

		1996-2020	1996-Buildout	
		Preferred	General	General Plan
	1990-1996	Alternative	Plans	Buildont Vast
Clovis	8.4%	2.0%	5.0%	TOO TOO
Coalinga	3.4%	1.20	2/2:3	2030
Firehangh	Cate L	1.2.70	2.6%	2015
Tourist The Party of the Party	%/'C	1.2%	0.9%	2011
rowier	9.2%	1.2%	9.2%	1005[2]
Fresno	4.1%	1.8%	2 10	noon o
Huron	5.3%	1 7%	0,1,0	7070
Kerman	%6.9	1 20/	0/CC	2000[a]
Kinesbure	4 10%	1 500	3.8%	2013
Mendota	P/ 1:F	1.0%	2.7%	2012
- Company	3.9%	1.3%	2.4%	2010
Crange Cove	4.4%	1.0%	4.4%	1007[-1
Parlier	4.0%	1.1%	3.00	1227[8]
Reedley	2.0%	1.2%	2.5%	COOZ
Sanger	4.4%	%60	0.000	2017
San Joaquin	8.3%	2000	4.4%	2000[a]
Celma		6,270	3.6%	2014
**************************************	6.9%	1.2%	3.8%	2018
Unincorp. County	1.6%	0.8%		0103
TOTAL	2.4%	1.6%		
		PL DUE		

Notes: [a] 1996 population exceeded general plan buildout figure. Growth rate reflects 1990-1996 historical experience.

EXHIBIT 21

TRANSLATE ECONOMIC SCENARIOS INTO PHYSICAL GROWTH SCENARIOS

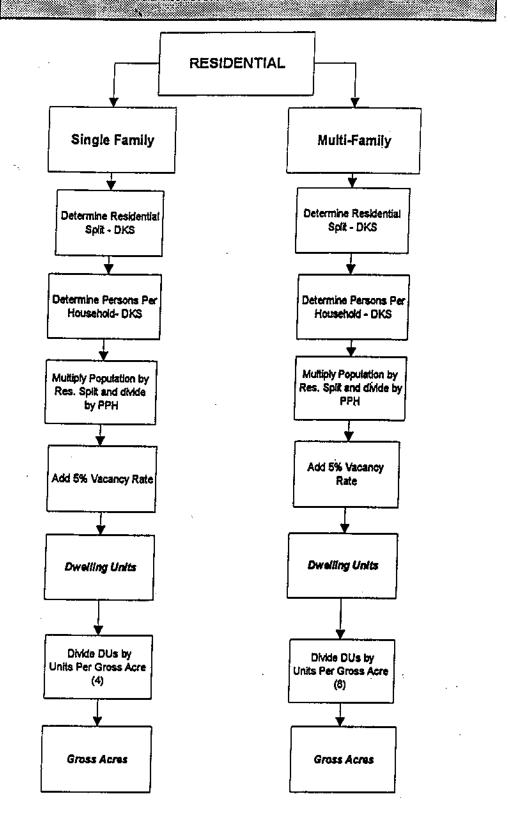
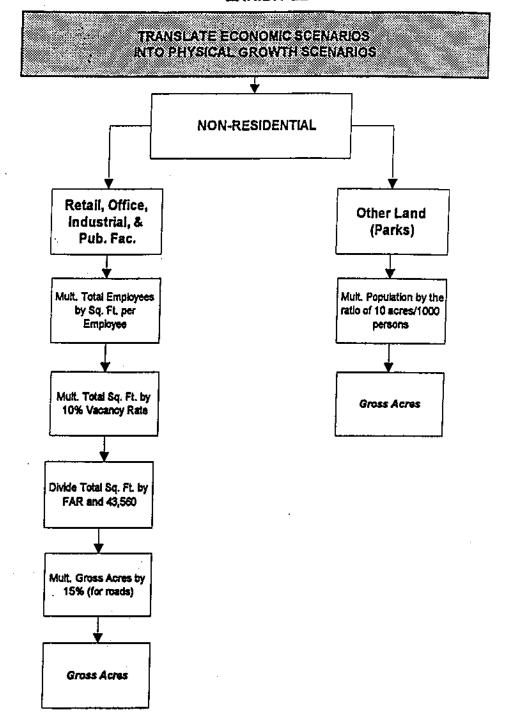


EXHIBIT 22



PREFERRED GROWTH SCENARIO ASSUMPTIONS AND MULTIPLIERS

Residential Development/Land Demand

Average House Size: Varies by city and geographic area; based on Council of Fresno

County Governments projections

Single Family/Multi-family Split: Varies by city and geographic area; based on

Council of Fresno County Governments projections

Vacancy Rate: Assumed average 5%

Density: Assumed 4 units per gross acreage for single family and 8 units per acre for

multi-family

Non-Residential Development/Land Demand

Employee Density and Floor Area Ratios

Retail: 550 square feet/employee, .25 floor area ratio Office/Professional: 300 square feet/employee, .25 floor area ratio

300 square feet/employee, .50 floor area ratio

(for the Fresno and Clovis area)

Industrial:

1,000 square feet/employee, .35 floor area ratio

Public/Institutional: 300 square feet/employee, .25 floor area

Vacancy Rate: Assumed average 10%

Conversion of Net Acreage to Gross Acreage: Add 15%

Other Land Development/Land Demand

Parks, Other Open Space, Miscellaneous Land Uses: 10 acres per 1,000 population

GEOGRAPHIC ALLOCATION OF POPULATION AND HOUSING

Year 2020 Total

•				Residential			
	Population	SF HH	SFDU	MF HH	MFDU	Cross Acres CE Cont A	
FRESNO COUNTY TOTAL	1,113,785	250,656	263,191	89,225	93.685	65 807	Acres Mr
					200/22	200'00	11,709
EAST VALLEY TOTAL	1,035,397	236,977	248.826	83 387	07 EEZ	200 47	-
Clovis	111,534	21,835	22.977	15 173	15,030	67,209	10,944
Fowler	7,142	1,690	1,775	204	707	2,732	1,992
Fresno	186'529	161,975	170.074	48.387	50 801	444	78
Kerman	11,015	2,406	2.526	845	100/00	47,719	6,350
Kingsburg	11,562	2.496	2,621	1 807	1 007	632	111
Orange Cove	9,150	1.682	1764	1,00	1,091	655	237
Parlier	12,892	2.276	2 390	710	442	442	55
Reedley	27,715	5.723	8009	2 571	CC/	298	94
San Joaquin	6291	945	900	1/0/7	2,700	1,502	338
Sanger	26,880	5,222	7//	242	467	248	58
Selma	29 028	7777	204,0	2,346	2,463	1,371	308
Unincorporated East Valley	104 107	0,100	0,493	1,007	1,057	1,624	132
	100,17/	145,741	89/'07	9,077	9,531	6,442	1 191
SIERRA FOOTHILLS (county)	13 038	2 200	7000				
	DC/OX	2,022	3,664	925	971	971	121
SIERRA NEVADA MTNS. (county	6,711	1,272	1,336	261	274	334	70
WEST VALLEY TOTAL	50.440					*	5
Coalinea	12,040	8,649	9,083	4,604	4,834	2,272	404
Firohamah	740,61	1,990	2,090	628	629	573	6
Tangaran	7,757	1,373	1,442	739	77.6	136	78
Huron	9,456	1,134	1,191	1.134	1 101	100	97
Mendota	11,838	1,631	1,713	917	1,47,1	298	149
Unincorporated West Valley	15,347	2,521	2,647	1.186	1 245	428	120
					CLYY	799	156
COAST RANGE FOOTHILLS	299	59	62	48	5		
					3	çı	9

GEOGRAPHIC ALLOCATION OF POPULATION AND HOUSING 1996 - 2020 Increment

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C.

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- 91

			_	Residential			
	Population	SF HH	SFDU	MF HH	MEDU	Gross Acres SE	Gross Amer Mr
FRESNO COUNTY TOTAL	344,085	77,735	81,621	27,865	29,258	20.410	3 KU
							DON'S
EAST VALLEY TOTAL	325,592	74,698	78,433	26.401	27.722	19 612	E)FC
Clovis	42,274	8,276	8,690	5.751	6039	2 173	70%/6
Fowler	1,795	425	446	149	156	117	00/
Fresno	230,782	55,299	58,064	16,518	17.344	14.516	9216
Kerman	3,006	259	069	231	243	173	200
Kingsburg	2,519	544	571	394	414	143	50
Orange Cove	1,964	361	379	06	95	95	17
Parlier	2,925	516	542	163	171	13%	21
Reedley	6,787	1,402	1,472	630	662	368	21
San Joaquin	2,573	387	406	182	191	5	8 2
Sanger	5,304	1,030	1,082	463	486	707	74
Selma	7,172	1,528	1,604	249	261	1/7	19
Unincorporated East Valley	18,493	4,273	4,487	1,581	1,660	1 199	33
						771/1	700
SIERRA FOOTHILLS (county)	2,211	587	919	147	154	154	19
SIERRA NEVADA MTNS (county	אלנ	107	ţ				
		À	717	77	23	28	3
WEST VALLEY TOTAL	15,692	2,338	2,455	1.291	1355	212	7
Coalinga	3,183	486	510	153	191	178	1/0
Firebaugh	1,905	337	354	182	191	077	0,7
Huron	3,189	382	401	382	401	130	24
Mendota	3,211	442	464	249	761	1100	20
Unincorporated West Valley	4,204	169	726	325	341	182	33
		:					2
COAST KANGE FOOTHILLS	25	5	ນ	4	4		
							-

GEOGRAPHIC ALLOCATION OF EMPLOYMENT Year 2020

	:				Non	Non-Residential	7					
			RETAIL					OFFICE				
		Tot.	Employee	Gross Floor	Total Sq Ft.	Net	Gross	Employee	Employee Gross Floor Total So Et	Total So Ft	ioiZ	
	opulatio	Employ.	e a	Area	(inc. vac.)	Acreage	Acreage	, 8	Area	(inc. vac.)		Acreage
FRESNO C	1,113,785	602,020	142,122	78,167,100	85,983,810	7,896	9,078	112.632	33 789 600	37 168 560	: [,
			:						nonton don	000,001,00	1,700	, you
EAST VALU	1,035,397	562,658	135,653	74,609,150	82,070,065	7,536	8,665	111.160	33.348 000	36 GR7 R(V)	1 605	000
Clovis	111,534	63,017	14,323	7,877,650	8,665,415	796	915	16,470	4.941,000	5.435.100	2500	1,939
Fowler	7,142	3,473	587	322,850	355,135	33	38	368	110,400	121,440	37	007
Fresno	675,981	381,989	97,	53,834,000	59,217,400	5,438	6,254	87,551	26,265,300	28.891.830	1307	1 506
Kerman	11,015	4,165		479,050	526,955	48	55	315	94,500	103,950	2	4,720
Kingsburg	11,562	5,746	1	736,450	810,095	74	85	230	159,000	174 900) x	0
Orange Cov	9,150	3,526		305,250	335,775	31	36	177	53.100	58 410	0 0	, ,
Parlier	12,892	5,075		416,900	458,590	42	48	369	110.700	123,770	۲	2 1
Reedley	27,715	12,535	3,	1,745,700	1,920,270	176	202	1,119	335.700	369.770	0 2	1
San Joaquin	6,291	1,629		271,700	298,870	27	31	130	39 000	A2 Gry	<u> </u>	3 6
Sanger	26,880	11,986		1,340,350	1,474,385	135	155	1,018	305 400	335 040	7 1	7
Selma		10,801		1,797,400	1,977,140	182	209	810	243 000	OF7,556	2 5	
Unincorpora	106,197	58,716	296'6	5,481,850	6,030,035	554	637	2.303	000 009	750 990	71	4 3
									O CONTRACTOR OF THE PARTY OF TH	066767	S	£ .
SIERRA FO	13,938	3,430	879	483,450	531,795	49	56	229	002.89	75 570		>
					-				-	0/2/2/	١	5
SIERRA NE	6,711	1,024	736	404,800	445,280	41	47	59	17,700	10 470	> -	c ·
									0		- -	-
WEST VAL	57,440	34,870		2,655,400	2,920,940	269	309	1.175	352 500	387 750	9	= ;
Coalinga	13,042	6,242	1,1	639,100	703,010	65	75	SS	91.500	100 450	10	2
Firebaugh	7,757	3,952	568	312,400	343,640	32	37	151	45 300	40,000	n (9
Haron	9,456	4,328	ເສ	347,050	381,755	35	40	136	00000	000/21	7	2
Mendota	11,838	4,661	743	408,650	449,515	41	47	282	000000	44,880	2	2
Unincorpora	15,347	15,687	1,724	948,200	1.043,020	8	110	707	04,000	93,060	4	5
			_	-		2	OTT	301	20,200	99,330	5	9
COAST RA	299	38	26	14,300	15,730	-	1	6	2 700	0000		
							1		4,7,00	7,770	0	0

EXHIBIT 26 cont'd

GEOGRAPHIC ALLOCATION OF EMPLOYMENT Year 2020

		,			No	1ear 2020 Non-Residential	Įo;					
	INDUSTRIAL	IAL				PUBLICAN	PUBLICANSTITUTIONAL	IAL			OTHER LAND	ON
-												<u> </u>
	Employee	Gross Floor	Total Sq Ft.	Net	Gross	Employee	Employee Gross Floor Total Sq Ft.	Total Sq Ft.	Net	Cross	1000	Total
	s	Area	(inc. vac.)	Acreage	Acreage	**	Area	(inc. vac.)	Acreage	Acreage	Acres	Gross
FRESNO C	153,253	153,253,000	168,578,300	11,056	12,716	92.070	27 621 000	30 382 100	002.0)	,	Acres
							2000	20,000,100	7,7%	3,209	11,137	38,104
EAST VAL	143,991	143,991,000	158,390,100	10,389	11,948	87.989	26.396.700	29 035 370	7776	0		
Clovis	17,349	17,349,000	19,083,900	1,252	1,440	11.317	3 395 100	2 724 510	2,000	3,065	10,354	35,971
Fowler	1,179	1,179,000	1,296,900	88	88	443	132 900	142 100	593	394	1,115	4,152
Fresno	105,216	105,216,000	115,737,600	7,591	8.730	703 69	18 758 100	061,051	13	15	77	229
Kerman	746	746,000	820,600	54	62	837	251 100	016,600,02	CK8/1	2,179	092'9	25,449
Kingsburg	2,287	2,287,000	2,515,700	165	5	736	20000	017077	2	52	110	262
Orange Co	2,098	2,098,000	2307,800	151	174	305	110 500	242,880	22	25	116	425
Parlier	2,505	2,505,000	2,755,500	181	286	75.4	000000	130,350	12	14	92	319
Reedley	2,261	2,261,000	2.487.100	163	187	100 1	220,200	248,820	23	26	129	418
San Joaqui	459	459,000	504 900	33	20	1,024	007,890	625,020	57	99	277	752
Sanger	4,846	4,846,000	5330.600	350	8	41/	001,621	137,610	13	15	છ	149
Selma	3,988	3,988,000	4.386.80n	288	201	2,78	528,900	581,790	53	19	269	905
Unincorpor		1.057.000	1 169 700	25	150	1,5//	413,100	454,410	42	48	290	892
			מו וישמילים	2	۵	676'6	1,658,700	1,824,570	168	193	1,062	2.019
SIERRA F	115	115,000	126,500	8	0	FAE	120 500	7				
						3	102,200	186,450	12	20	139	227
SIERRA N	9	9000	9,600	0	0	223	006 99	72 500				
							20.762	02001		×	29	123
WEST VAL		9,140,000	10,054,000	629	759	3,290	987.000	1 085 700	200	,		
Coalinga	3,211	3,211,000	3,532,100	232	267	985	295,500	325 050	3	9 8	574	1,779
Firebaugh	2,014	2,014,000	2,215,400	145	167	563	168,900	185 700	30	8 8	130	513
Huron	1,832	1,832,000	2,015,200	132	152	452	135 600	140 120	<u> </u>	07	78	304
Mendota		1,664,000	1,830,400	120	138	561	168300	185 120	14	9	95	305
Unincorpor	419	419,000	460,900	30	38	779	218 700	240 570		22	118	328
							W. 2002	U/C,UF2	77	22	153	329
COAST RA	-	1,000	1,100	C	0	3	006	000				
								220	=		8	4

GEOGRAPHIC ALLOCATION OF EMPLOYMENT 1996 - 2020 Growth Increment

	ı		-		γ-	_	_		_			$\overline{}$				1	7	$\overline{}$	ī	_	,	,	_	_	_	_	7	_	_	_		_
-			Gross	Acreage	1,449		1,439	237	6	1,164	د ا	3		3	7		7	2	3		3		0		7	2	- 		1	` -	•	ľ
			i i	Acreage	1,263		1,253	206	3	1,012		2		0	9	1	9	9	3		3		0		7	2	1	-	7			-
			1	(ilite, Vac.)	27,491,731		27,277,674	4,483,710	2/0/60	50,000	(X)7, CA	20,700	06/07	69,072	132,660	27,720	121,440	129,030	64,020		55,110		C		158,947	34,537	26,730	27,720	52,470	17,490		_
٠.		ĺ	Employee Gross Floor Total Sq Ft.		24,992,483	- 1		4,070,100 62 703	20.034 600	54 000	52,000	18 900	207.03	120 (00	120,000	25,200	110,400	117,300	58,200		50,100		0	344 407	21 207	762/10	24,300	25,200	47,700	15,900		0
ial	OFFICE		Employee G	- 1	83,308	027 68		200			190	83	200	400	704	£ 5	368	391	194		791	-		481	101	5	10	88	65	53		o
Non-Residential	<u> </u>		Gross A		2,808	2,656	345	15	1.8811	24	21	16	24	7.	3 8	177	7 2	60	2	٦	OT	4	1	129	26	12	3 2	9 2	9 8	3	6	3
Non			Net Acreage	F	7,447	2309	900	13	1,636	21	18	14	21	48	2	8	3 5	101	151	1	2	4		113	23	14	23	33	3 8	3	-	,
			Total Sq Ft. (inc. vac.)	26 542 EDE	20005	25,135,330	3,263,370	138,545	17,816,040	232,320	194,205	151,855	225,665	523,930	198.440	409.585	553 575	1 427 800	יייאגני יסמי	170.610		43,560		1,211,210	245,630	147,015	246,235	248.050	324.280	2011	1,815	
			Gross Floor Area	24 147 750	2000	22,850,300	2,966,700	125,950	16,196,400	211,200	176,550	138,050	205,150	476,300	180,400	372,350	503,250	1.298.000	nanta de	155,100		39,600		1,101,100	223,300	133,650	223,850	225,500	294,800		1,650	
	RETAIL		Employees	43.905		41,546	5,394		53	384	321	251	373	998	328	229	915	2,360		282		72		2,002	406	243	402	410	536		3	
			Tot. Employ.	231,241		219,660	28,779	1,191	159,995	1,466	1,010	1,203	1,782	3,672	831	3,713	3,662	11,750		1,196	•	119		10,260	1,977	1,326	1,844	1,685	3,427		5	
			Population	344,085		325,592	42,274	1,795	78/007	3,006	1 064	1,701	C76'7	/8/9	2,573	5,304	7,172	18,493		2,211		565		15,692	3,183	1,905	3,189	3,211	4,204		25	
				FRESNO C		EAST VAL	Clovis	rowier	Versin	Kingaham	Orange Co	Parlier	Dodler.	Veralley	San Joaqui	Sanger	Selma	Unincorpor		SIERRA F		SIERRA N	MITTER TO A	WEST VA	Cirche	ritebaugn	Huron	Mendota	Unincorpor		COASTR	

EXHIBIT 27 cont'd

GEOGRAPHIC ALLOCATION OF EMPLOYMENT 1996 - 2020 Growth Increment

	ē		Total	Acres	13,667	N.	12.94n	1.628	150	9.415	105	120	Ē	136	244	7	283	280	470		53		12		929	161	ě	143	133	126		Ĉ
	OTHER LAND		Gross	Acres	3.441		3,256	423	18	2,308	30	25	20	29	89	792	53	72	185		22		9		157	32	19	32	32	42		0
			Gross	Acreage	992		938	122	5	665	6	7	9	&	20	7	15	21	53		7		-		\$	6	9	6	6	13		0
٠.				Acreage /	861		814	106	4	578	8	9	5	7	17	9	13	18	46		9	,		Ş	40	8	5	æ	8	11		0
	VI.		Total Sq Ft.	•	9,385,860		8,881,290	1,153,020	48,840	6,295,410	81,840	68,640	53,460	79,860	185,130	70,290	144,540	195,690	504,570	00000	00,390	15 640	UlCct	428.010	07,700	06/'90	51,810	87,120	87,450	114,840		8
ial	TITUTION		Gross Floor		8,532,600		8,073,900	1,048,200	44,400	001,627,0	74,400	02,400	48,600	72,600	108,300	00,53	131,400	177,900	458,700	54 000	22,000	14.100	24,100	389.100	78 000	47.100	00000	70 500	000/2/	104,400	W.7	25
Non-Residential	PUBLICANSTITUTIONAL		Employees (28,443	7.07.0	20,914	3,494	10.077	770,01	240	2007	107	747	301	517	450	293	1,529	183		47		1,297	263	157	264	265	240	OKO	2	!
No.			Gross Acreage	,	4,977	1777	3 5	5	3 207	200	3 3	5 2	3 8	7 8	2	2 <u>2</u>	100	DC1	Ŷ	6		0		317	26	62	33	22	¥.	3	0	
			Net Acreage	١	4,329	4046	436	, K	2 954	34	3 2	2 2	3 8	3 &	2	141	112	3 8	3	8		0		275	80	54	જ	46	E		0	
AL	·	Total Sq		44C.)	W,712,000	61,666,000	6.647.300	528,000	45,030,700	512.600	853,600	768,900	960.300	1256,200	206.800	2,149,400	1 719 300	1.032.900		121,000		0		4,185,500	1,224,300	820,600	988,900	701,800	449,900		0	
		1	Gross Floor	59 975 000	0000000	56,060,000	6,043,000	480,000	40,937,000	466,000	276,000	000'669	873,000	1,142,000	188,000	1,954,000	1.563.000	939,000		110,000		0		3,805,000	1,113,000	746,000	000′668	638,000	409,000		0	
INDUSTRIAL			Employees	59 975		56,061	6,043	480	40,937	466	776	669	873	1,142	188	1,954	1,563	939		110		0	1	3,80,	1,113	746	899	638	409		0	
15				FRESNO C		EAST VAL	Clovis	Fowler	Fresno	Kerman	Kingsburg	Orange Co	Parlier	Reedley	San Joaqui	Sanger	Selma	Unincorpor		SIERRA F		SIEKKAN	WITTON TO A	WEST VAL	Coalinga Ti	rirebaugh	Huron	Mendota	Unincorpor		COASTRA	

LAND DEMAND SUMMARY 1996 - 2020 Growth Increment

. •	Residential Gross Acreage	Non-Residential Gross Acreage	Total Gross Acreage
FRESNO COUNTY TOTAL	24,070	13,667	37,737
			01,131
EAST VALLEY TOTAL	23,079	12,940	36,019
Clovis	2,928	1,628	4,556
Fowler	132	81	213
Fresno	16,684	9,415	26,099
Kerman	203	105	308
Kingsburg	195	120	315
Orange Cove	107	101	208
Parlier	157	136	293
Reedley	451	244	695
San Joaquin	126	71	197
Sanger	332	281	613
Selma	434	289	<i>7</i> 23
Unincorporated East Valley	1,330	470	1,800
SIERRA FOOTHILLS (county)	173	59	232
SIERRA NEVADA MTNS. (county)	31	12	43
WEST VALLEY TOTAL	785	656	1,441
Coalinga	148	161	309
Firebaugh	113	104	217
Huron	150	143	293
Mendota	149	122	271
Unincorporated West Valley	225	126	351
COAST RANGE FOOTHILLS	2	0	2

LAND DEMAND AND AVAILABILITY FOR CITIES WITHIN FRESNO COUNTY

Total Gross Acres - Residential and Non-Residential Land Demand

City	1996 Acreage in SOI	1996 Acreage in City Limits	1996 Unincorporated Acreage in SOI ¹	Land Demand Acreage ²	Difference ³
Coalinga	5,248	2,624	2,624	309	2,315
Clovis	14,592	9,856	4,736	4,556	180
Firebaugh	3,200	1,984	1,216	217	999
Fowler	4,544	1,216	3,328	213	3,115
Fresno	90,880	66,752	24,128	26,099	(1,971)
Huron	1,344	1,024	320	293	27
Kerman	3,072	1,216	1,856	308	1,548
Kingsburg	3,648	1,472	2,176	315	1,861
Mendota	2,240	1,344	896	271	625
Orange Cove	1,664	1,024	640	208	432
Parlier	1,664	960	704	293	411
Reedley	4,672	2,752	1,920	695	1,225
San Joaquin	960	640	320	197	123
Sanger	4,672	2,880	1,792	613	1,179
Selma	6,528	2,496	4,032	723	3,309

- This represents the total amount of unincorporated land outside city limits but within the city sphere of influence.
 Taken from Exhibit 28.
- 3. The "Difference" column shows the difference between available land and land demand. The negative value (in parenthesis) shows land demand that exceeds available land. This does not reflect potential infill development within city limits or existing development in the unincorporated sphere of influence.

Sources: Consultant Team; Fresno LAFCO